

Bev Feldman - How Solopreneurs Can Make The Most Of ConvertKit Automations

Jan Koch 00:03

Hey friends, I am here with Bev Feldman from your Personal Tech Fairy. Bev and I connected a while ago, as we spoke about ConvertKit, which is her ballpark. She's right at home at ConvertKit being a ConvertKit consultant, and she's here today to share with us what types of automations we need, how we can save time in nurturing our lists, how we can make the most out of the tech out of our hands frankly. Bev, thank you so much for taking the time to be with us.

Bev Feldman 00:34

Well, thank you so much for having me.

Jan Koch 00:36

Absolutely. And I would love to hand it over for you straight away and give us a little introduction of what you do as a Convertkit consultant, and what types of pain points you usually solve for your clients?

Bev Feldman 00:49

Yeah, great question. So on a high level, I do a bit of strategy work, but also the implementation. So helping my clients who are most often solopreneurs, to figure out how to make the most out of ConvertKit, based on what they needed to do, but also thinking through some aspects of email marketing that they might not even know about, and then actually taking those ideas and translating them into automations on ConvertKit. And I would say in terms of pain points, the things that I'm noticing is, one a lack of time. A lot of the clients who come to me recognize the importance of email marketing. Even in the year 2022 email is not going away anytime soon. So they understand that it's an important part to running and growing their business, but they might not necessarily have the time to go and figure out ConvertKit. And while I like to think that ConvertKit is a pretty user friendly, intuitive platform, like learning any other new tech platform, there's always that initial learning curve. And another thing that comes up is, again, while I think it's fairly intuitive, a lot of times, people don't understand the jargon, the words that the platform uses, which I think you'd find in a lot of other platforms. So it's trying to get their head around what everything means and how to actually set things up.

Jan Koch 02:13

Yeah, and I would add to that, that there's so much noise in this space, which I'm trying to clear up with the session at this event that we are now a part of, but there are so many gurus who throw all sorts of different tactics and strategies at people nowadays. And it's really hard to identify who you should listen to, and what is actually a good strategy for your personal business. Because what works for an E commerce brand is totally different from what works for service based business. And it's totally different between b2b and b2c and all that stuff. So I'm very glad that you are here to help us clean up this mess

a little bit and shed some light on things. So when we take a step back, we are solopreneur. Maybe we have a freelance business, or we provide some service to our clients. Why do we need an email list? And what role do automations play for this?

Bev Feldman 03:11

Yeah, so with an email list, you own that information, I think is we're learning more about privacy updates that are happening. I know a big one in the last year has been the Apple iOS update, which makes it more difficult to market in certain ways that a lot of us have been taught. But when you have an also, we're at the mercy of algorithms when we're relying on social media. So with email marketing, while you can't guarantee that everyone who signs up to your email list is going to see is going to open your emails, at least you're guaranteed to show up in their inbox, assuming you don't do some things that get you flagged as spam. So that is, in my opinion, I think it's really important to make sure we have some sort of system set up for us so that no matter what happens, Facebook and all the whole Metaverse goes down for the day, you still have your email list, for example. Or Facebook decides you did something wrong, and they close your Facebook account or your Instagram account, you still have your email list. So you will always have that information as long as you are following privacy laws, which I know you're covering in another session. If you haven't watched that, please do because I can't tell you how many times people come to me thinking like oh, well, I've covered GDPR by doing a double opt in and I'm like no, that's not quite right. But that's beyond the scope of this presentation.

Jan Koch 04:44

Yeah. That's the session with Donata and Hans on day four of the summit for sure.

Bev Feldman 04:50

Yeah. And then I think the other part was, you would ask me about the automation part. Like why should we have automations, correct?

Jan Koch 04:56

Yeah.

Bev Feldman 04:57

So I look at it as solo business owners, we have a lot on our plate. And, you know, it's very easy for something like email marketing to, fall, on that list of things that just doesn't get done. And the thing that's nice about automations is while it takes a little bit of upfront work to set them up, once you invest that time, you theoretically can just have it running in the background. So it's not like if you are posting on social media, and you have to manually go and periodically put in new content with an automation, it's just constantly running in the background, which is really nice. So set it once, and then theoretically, it's going. I do recommend periodically going in and checking things, but at least you know, you've got something going.

Jan Koch 05:45

Yeah, this is so critical. Because I feel as business owners, we need to identify our zone of genius. And we need to make sure that we spend the time on activities where it actually makes the most sense for us to spend the time on and personally answering every single email that comes in certainly doesn't fall

into that role. So how do we get started? If somebody's new to all these things about automation, and lead nurturing, and onboarding people and indoctrinating them to your message and all that jazz? How do we start?

Bev Feldman 06:20

So I always recommend that people start with at least some sort of welcome sequence. So that is a series of emails that people receive once they sign up for either your opt in, or they come onto your list somehow. And that's a way for people who enter into your newsletter, or your new subscribers to get to know you, as a business owner a little bit more and see if it's a good fit. And there's two parts to it, well, a couple of parts to it. One, you're going to generally find the most engagement with people at that point, because they're excited, they've signed up for something they want to hopefully want to implement it. And so they're more likely to open up those initial emails from you, and see if that is a good fit. And, well, I know a lot of people kind of get freaked out by the thought of people unsubscribing, I look at it as a good thing, especially if during that welcome sequence going on. Like people are kind of self identifying like, oh, no, this isn't a good fit. And you don't want everyone who signs up for your email lists to necessarily stay on your email list. Unless you have an amazingly engaged group of people, it's really good to have people self identify if it's not a good fit, because it's going to overall impact your deliverability meaning your emails showing up in the inboxes of the people who actually do want to read it. If too many people aren't opening your emails, that's going to impact the ability for your emails to show up in everyone's inboxes. And also, you don't want to pay for people who aren't going to engage with you at all. Now, I know that not everyone who comes onto my email list, for example, is necessarily going to hire me or work with me. But as long as they're getting something out of the emails that I'm sending them, then that's fine. If they're opening none of them, though, over time, I'm going to want to clean that up. So actually, that kind of ties us into the next one. I know this is for talking to people who are new to this, you're not quite at the point where you're going to clean up your list, but it is something that I generally recommend you do periodically, some email platforms will let you do that as an automation. Others, like ConvertKit, which I use, it's a little bit more of a manual process. But I think that's another key thing is kind of funny to think about we're talking about getting people onto your email list and nurturing them. And we're simultaneously talking about keeping your list clean and saying goodbye to the people who aren't engaged.

Jan Koch 08:52

It's so counterintuitive, but it's super important. I'm glad you're bringing this up. So if I understand that correctly, just to summarize, when we have, let's say 5% open rate on our emails, it shows that, first of all, our messaging is not on point. And it shows that people couldn't care less about us and about our business, frankly. So it is a good idea at some point to clean up that list to remove people who haven't opened an email and let's say that the last six months or something like that, so that, as you said, you don't pay for them because most service providers charge based on the number of subscribers you have. And you don't impact the open rates overall. But let me circle a little bit back to the welcome sequence because I find that many people struggle with structuring the sequence like what do I write in those emails? How many emails do I write? Do I send them out every day? Do I send them out once per week? Like what are some of the best practices around welcoming sequences?

Bev Feldman 09:59

Yeah. It's interesting, because that's a question I'm often asked. And so when I help my clients, and actually, I don't have one set way that I work with people in terms of how we structure things. I do recommend, kind of more broadly with a welcome sequence, that having your email spaced more closely together than you might otherwise. So I find a lot of people that I work with, are so concerned with annoying their subscribers that they kind of swing in one direction, and they never email their list. And so the thought of sending several emails kind of more spaced together at the beginnings, a little like, Oh, my goodness, but I do recommend, at least within the first couple of weeks, sending a few automated emails. So people again, we mentioned earlier that people are more likely to be engaged with you there and you're building up that name recognition. And you're hopefully getting to the point when they see your name show up in their inbox, you're like, oh, yeah, that person sent me really good information before. I want to open up and see what great information they sent me today. And so part of getting to that point is making sure, it's striking that balance between making sure that you're showing up enough at the beginning that people start to remember who you are, and see that you're adding value, and not so much that they're like, my goodness, how many emails is this person going to send me. But I also do recommend that you make a note of that within your welcome sequence and let people know. Hey, you're going to be getting a series of, for example, three emails for me over the next week, and I'm going to share content about XYZ. After that, you'll be entered into my weekly newsletter, and you can expect to receive an email from me once a week on Wednesdays. So you're really laying out for people, when they can expect to hear from you and how frequently and letting them know this is a little more frequently than you will normally hear from me. So that people know what they can expect from you.

Bev Feldman 09:59

Yeah, this is so important. I do the same in the onboarding sequence for List Building School too. I tell them that, hey, as we come closer to the summit, you will get more emails than from your average newsletter. But then when the summit is over, feel free to unsubscribe if it wasn't of any value, or just stick with it. And then the regular schedule is one email per day. On my regular newsletter, that's just because it's the best format that I found success with. When it comes to the contents of the welcoming sequence is their a way on what to write in the first email? What should we write in the second email? When can we go for the pitch? What are some of your thoughts about that?

Bev Feldman 12:54

Yeah so I like to do a couple different things with welcome sequences and when I recommend them to clients. I like doing one email that's really just a get to know me kind of email. And generally, I think a lot of us are taught you don't want to overdo the mee, mee mee, but I think it is helpful for them to better understand and get a sense of who you are. Because I think a lot of us, we hire based on emotion. So we want to hire someone who's probably feels like a good fit for us. So it's good to get to know that person a little bit more. So I always recommend, some sort of, here I am, here's me, and how I work with people. Depending on how you have your optin setup. I like to do some emails that are really based on engaging with people. So asking them a question that not only gets them to reply to you, so that again, you're sending that signal to their email platform, oh, hey, this person wants to hear from me. So having emails that invite the person to reply. And I find it's always a really pleasant surprise for people on the receiving end when they actually get an email back. So you know, you get their automated email, they reply back, and then they hear back again, from the business owner. Oh, my

goodness, there's an actual person on the other end. So and then some sort of sorting type of email. Meaning if you're trying to get to know the people on your list a little bit better, offering them an opportunity to ask them a question, but they just have to click on something within your email. And you can set that up as we are here to talk about automations depending on what that you're asking them, you could theoretically have that turned into another automation. So for example, something that I'm experimenting with right now is identifying people who want to kind of DIY their ConvertKit account versus people who are like, I just want someone to do it for me like I'm gonna gotta send them different information. I'm not going to pitch the same services to them. And so based on that information, I could down the line either send them into another automation that lets them know about a product or service I offer that would be most beneficial to them. And so like, going back to your question about the pitch, I think it also depends on kind of how ready your audiences and what it is that you're selling, I think it's probably easier to sell something that's a little bit lower price. But then again, it also depends on what your business is. So for example, one of my clients was a realtor. So the way that we would structure things for her would look very different from a client, for example, who teaches like online and in person yoga classes.

Jan Koch 15:53

Yeah. That's a great point. And I think, if I understand you correctly, we are very aligned here. And that it is about building this connection with your subscribers. And it is about remembering that there is a human being on the other end, who's actually receiving your email. And I had this experience, the day before, we were recording the summit, where I got a testimonial from somebody who attended one of my WordPress events, and I looked him up, and I actually saw a face to the email. And that just made it so much more real. And he was saying how to summon contents helped him and stuff like that. And seeing that there's actually a human being who profited from the contents that the speaker has put out at these virtual events was super inspiring for me. And it is like, most people who online these days, they get bombarded with the all these get rich quick and build your digital marketing agency in 90 days and earn \$50,000 a month in 90 days and all that jazz. So people are trained to expect that after three days after somebody signed up, you can pitch them on a \$5,000 per month retainer for social media marketing. And it's just, it's not the case. It's about I think leveraging automation to build that relationship at scale. And if you only have 500, or 1000 subscribers, and you can respond to every email manually, if you invite replies, and you get replies, you can respond to every email automatically or manually. At some point, it will grow too big. But that's the time when you hire a virtual assistant or somebody like that, because I would never forsake that human connection.

Bev Feldman 17:39

Exactly. And I think like, I mean, that's so much of how I built up my business but even though things are automated, that you can still use email marketing as a tool to connect with your audience. And that point you brought up about remembering that those are actual human beings on the other side that are receiving our emails. And I'd like to add that I think so many of the marketing tactics that many of us have been taught and have been ingrained in this space. It's almost like we've lost that sense of we are selling to a human and it's almost like we're trained to just look at everyone as a number and like how can I just sell, sell, sell and get the most out of this instead of how can I provide the most value to the people who are here?

Jan Koch 18:28

Yeah, absolutely. And that is, I think the perfect segue back to that automation that you brought up where you segment your list, and the welcoming sequence, and you sort them by how ready am I to invest? Or what am I actually looking for? So, dive a little bit deeper into that, please, how do we set that up?

Bev Feldman 18:49

Yeah. So again, it really depends on what it is your business is. So there's a few different things. So going back, for example, I'm gonna go use a client that I worked with a year ago, and she was like a professional organizer, but she also work with people who were getting ready to move. So someone who's looking for professional organizer, because their homes a mess, and they just want to live in a tidy house versus someone who's prepping for a move, you might give them different information. And I can't remember if we set this up in our opt in, but for a lot of these platforms, you can have a simple question that's either like a checkbox like check off what applies to you. And it can be either like multiple things or choose one and that gives you really valuable information that helps you then better understand how and what information to send your audience. So for something that I've been doing lately is some of my opt in forms, I have people identify like their ConvertKit personality like which one sounds the most like you. And it's like, DIY, I have no idea what I'm doing. I gave them fun names, I just can't remember them off the top of my head, I think it's like DIY DD. And then, people were like, Oh, I know what I'm doing versus someone who's like, well, I don't actually use ConvertKit. That's also really helpful information to me, because I'm not going to necessarily tell them about my ConvertKit services. But just talk more generally about email automation. And so there's two parts, sometimes it's, you're getting a totally different email, or sometimes, and you can do this with some email marketing platforms, can show conditional messaging within the email itself. So depending on how they've self identified, they might see a completely different message, or it might be framed slightly different. So even if I'm telling them about the same service, I might frame it in a slightly different way.

Jan Koch 20:57

This is this amazing and I think it's worth diving deeper into this because not enough people do this. And it's similar to all those core pitches and dm's that we all get annoyed by these days, where you just, you can clearly see it's a template that they put into a DM without even looking at your profile and seeing what's relevant. If we have a feeling for our subscribers, that we know them that our message is exactly tailored to them. So for example, if I pitch my virtual summit mastery method book to somebody who I know can't afford the full course, they might buy the book, and then maybe six months down the road, I may be able to invest in the program or not, but at least I can help them. Whereas if I throw a \$10,000 coaching off at them, that's ruining the relationship directly. So what do you usually segment by? Do you segment by the types of service, I could sell to somebody potentially, and the traits that go with each of them?

Bev Feldman 22:02

Yeah, I mean, for my own email marketing, it is based on kind of what level they're at, and then I have a few different services I offer. So I might let them know about slightly different things. And again, depending on what your business is, it could be either like these people get offered this thing, these people get offered this thing, or it could be like, oh, this person fits into these few buckets. I feel like I

need to give a more concrete example. I guess, going back to the client, I used to work, the home organizer. So she might send information to people, about people who are prepping to move, she might send them the same information about like, how to clean out, go through and clean your things, that you would send people who just want to get their house organized in general, and then she might also send some additional information. So it's hard to give a very specific, here's what you should do, because again, it depends so much business on your business and how you work with people.

Jan Koch 23:08

I think it boils down to understanding the needs of your target audience and then knowing how to cater to them and I am sweating as hell, by the way. It's 30 degrees here in the office, I can't have the aircon on because it will be too noisy for recording. Essentially, what this boils down when we're segmenting is we need to be aware of the different stages our audiences are in because they can be problem unaware. So they don't even know that they have a problem. They can be problem aware. They know they've got something that they need to change, but they don't know how to do it, then they can be the next stage is solution aware. Knowing that there are some people or some tools or whatever that can fix the problem. They trust your solution and they hire you. And this is from Jason van Orden session from this virtual summit. It's not my wisdom. But I think when you keep those five stages in mind, it's a good start to segment your list. Now doesn't mean that we have to create multiple email newsletters every time we send them out or whatever. How does it impact the workload that we then create for ourselves if we follow through with those segments?

Bev Feldman 24:28

Yeah, I mean, I want to also just kind of go back to what you're saying that it's okay. First of all, it's okay if you're not sure as you're getting things started to know. Like when I started my email list for this business, I kind of initially treated everyone the same because I was still learning about people coming onto my email list and what types of services I was offering. So it's totally okay when you're starting to keep this very simple and then grow and adapt your email marketing as you have a better understanding of your audience. And of the services that you're offering. And I would say that I would much prefer people keep it as simple as possible, versus doing nothing. And then if you feel like you're ready for that next phase, then you could add in a second or another automation, or try to learn conditional messaging. So for me, for example, I generally do most of my email marketing in these evergreen email sequences. And I've gone back to some of them, and adjusted some of the messaging within them. So people might see slightly different emails. Or if I'm gonna email, letting people know about my services, and I will have anyone who's already worked with me, they won't get that email, because they already worked with me, and I don't need to hear about it. So it's one of those things, you can always kind of go in and tweak separately, but I don't have a bunch of different emails for each person, because it would just get to be too much work for me. And I only have so much time of the day. I love learning about it. But I also realize, we only can do so much for our business at a time. And I would say at the very least set up your email list and have some sort of automated sequence that goes out. And even if you don't have any thing separate, even if you do, for example, some sort of sorting email, that helps people that people have self-identify. You can always use that information later. You don't need to have anything set up right at the get go for that.

Jan Koch 26:37

That's a fantastic point, because the last thing I wanted to create is overwhelm. And I'm very glad you broke that down for us. That it's not like this one big task, we have to take it all at once. But we can take it step by step. Just bought another thought of mine, one of the automations I personally love for my own business is holding customers accountable. So that when somebody enrolls in a course, for example, I follow up with them automatically every other week, to see what the course progresses to ensure that they follow through this process. And this can be for any service, frankly, you could ask for testimonials. That way, you could collect feedback, you can improve the relationship and increase the customer lifetime value. What are some of the most common automations that you get hired to set up for clients?

Bev Feldman 27:29

Oh, that's a good question. I mean, I actually, I did have one client, I've had a few clients actually have helped me set up just that exact thing. Like, I want to have an automation that lets them know about my product or service. And then if they hire me, or they purchase a course, for example, I want them pulled out of that automation and then pull put into this other automation where I can follow up with them automatically. So I'd say those are actually very common. I'm trying to think. That's a great question. Definitely, like some sort of welcome sequence. Automation is something that I do with clients. And it really runs the gamut. It's funny, because when I started this business, I'm like, Oh, I'm gonna offer these specific automations. And then I realized, oh, no, it's so business dependent.

Jan Koch 28:25

I can't imagine and you've just sparked in a thought with me that I would love to explore more on in terms of avoiding common mistakes that we do in automations. And one mistake that I made myself is bombarding people with the wrong email. So for example, when somebody bought a program, I would not pull them out of that follow up sequence, and they would still get why didn't you buy, and why didn't you buy and here's your non buyer survey, and I was like, Oh, my God, I've lost a customer forever, and I get a refund in the next day or something like that, because they annoyed of me. One other thing that I would love to share before I let it over to you is I have a Do Not Disturb tech. So this is a flag that I set inside ConvertKit. I'm using it to when somebody enters any automation, they get a Do Not Disturb flag or tag so that they are automatically excluded from receiving my daily newsletter. Because if you send daily, I cannot send a daily newsletter that is not related to an automation and that automated email. What are some of the mistakes that you get hired to clean up?

Bev Feldman 29:36

Yeah. Well, I would say like those are definitely I've helped people who've not even necessarily thought to do that. I'm like, we have to make sure if someone's in your welcome sequence, they're not also getting your newsletter at the same time. So very similar type of setup. And I've certainly been on the receiving end of oh, here's this thing and I'm like I just bought it am I getting another email, telling me to buy that thing?

Jan Koch 30:02

How do we do that with ConvertKit? Let's go a little bit since we both use ConvertKit. Let's go a little bit platform specific here. How how do you set these things up?

Bev Feldman 30:12

So similar to you, I have a tag that's a, it's kind of a pull out of an automation tag. So anytime someone signs up for something. So I have like a webinar on my website, or and I recently, at the time of this recording, I'm in both a bundle and was in the summit. So I had people sign up for multiple things. So I make that actually had to do something a little bit higher level, which that basically, for lack of a better word counts how many automations are in so that when it gets to zero, then it puts them back into the regular sequence. It was a little complicated thing. I'm like, what if I have people sign up for three things at once, and I don't want them going into my welcome sequence if they're still in the other ones. So that was some fun creative thinking. But yeah, similar to you, I do that kind of pull out. Especially because as I mentioned, most of my email marketing is automated. So I have something set up that pulls them out of the automated sequence. And then when they finish whatever other automation that they're currently that they got pulled into, it'll put them back in the same spot.

Jan Koch 31:26

That is amazinng. So essentially, no matter what they sign up to, you can pull them out at any point in time and bring them back.

Bev Feldman 31:34

Yes, theoretically, I tried it multiple times. And that's the thing. So when you mentioned earlier about noticing that you had people not getting pulled out of an automation. So I have a framework that automate with heart framework. It's H E A R T. And the last step is test and tweak. And I think it's one of the most overlooked steps of setting up an automation is always testing multiple ways. So like going into your opt ins and checking to see what happens on the back end of your email service provider. And making sure Oh, if I sign up for this, and then I sign up for that, what happens? Because I will say one thing that also commonly comes up for people is, well, what happens if I have people sign up for multiple freebies at the same time, and I'm like, well, at the very least you want everyone going into the one welcome sequence and assuming you have your settings set up correctly, they should only enter it once, anyway. So if they signed up for a new freebie, and they've been on your list for six months, they shouldn't then be pulled into your welcome sequence. And it's interesting, because with ConvertKit, you could only enter an email sequence once anyway. And they only recently I think in the last year, added that ability that you could enter into an email sequence over and over again, which there are certainly cases where you would want that, but there's lots of cases where you don't want that. So always checking the settings of your email automations. So knowing if you have an automation that you don't want people entering multiple times, making sure you have that set up.

Jan Koch 33:18

And it's a great point that you made about people signing up for multiple freebies at the same time. The way I do this is they first get this Do Not Disturb tag, no matter what freebie they sign up for. And then they get added to the other automations too. But they check if they have the Do Not Disturb tag. And when the automation detects, okay, this guy is already in some form of promotion. Let's just get them the freebie. Skip all the other indoctrination emails, and then remove them from the sequence already.

Bev Feldman 33:48

Yeah, I do something similar. And sometimes part of that is as your again this is kind of the next step and automations. But if you know you have the potentially someone could end up in multiple automations at once. Sometimes it could be just figuring out okay, well, what's the most important automation? And if there's one that kind of trumps all the others, then just making sure that people, that they're identified as being in that automation, have them just skip all the other ones?

Jan Koch 34:20

Yeah, that's so great. I would love to talk a little bit about the mindset that you have to have when it comes to building automations. Because we are getting more abstract and more technical by the minute, whatever you'd like. And I think for both of us, it's quite natural. You've been doing automation all day every day. I'm a developer by trade. I know how to think analytical and abstract when it comes to somebody who's super creative and super visual and who has no experience building automations how can they wrap their mind around thinking in a way that actually lets them set up a good automation?

Bev Feldman 34:59

Yeah, So I actually feel that this does require a lot of creative thinking. I will step back and say my online business journey started out as I was a jewelry designer and metalsmith. And a lot of people are like, how did you end up Jewelry and now you do email automations. And yes, while there's definitely a big technical aspect to doing this. It also requires a lot of creative thinking. And I have found for myself that if I'm feeling stuck, and I'm like I know there's a way to do this and I'm just not figuring it out. Just like when you're doing anything else, that's creative, taking a break. I like to go for a walk. Like I live in a city, but I live near a bypass. So I'll often go for a walk on the bike path to kind of clear my head and let the ideas ruminates. And sometimes it requires a day's worth of thinking to like go into bed. And sometimes I've actually had the answers come to me while I'm sleeping, which is a little interesting. So I think that's set of thinking of about this as it being very technical, especially if you consider yourself creative. Think of this as being a creative endeavor. And then I find it's really helpful. If you're trying to visualize it in your head, it can be a little tricky, but drying it out with pen and paper can really help you see what's going on and kind of makes sense of what it is you want to do. And I think you're drawing arrows and saying like, well, if I want this to happen, if someone does that it it kind of helps you figure out how to translate your vision into something on your email marketing platform.

Jan Koch 36:45

Get a big piece of paper?

Bev Feldman 36:47

Yes.

Jan Koch 36:49

Yeah, I love tools, like, what's this fun analytics that I think that I use? And it gets overwhelming at times. But then you zoom out. And you have, I have one on summit funnel that has like 150, 200 elements or something like that. But all those sales pages and squeeze pages and opt ins and stuff. But the more visual you can get with those automations, the more clarity comes in, and then as you go through these different parts, okay, this image triggers this thing, and then this follows, and you just take a step back and you go through it one by one at a slow pace and I think it becomes very manageable.

Bev Feldman 37:32

Yeah. And I think also, figuring out what it is your end goal is can help you kind of figure out the in between steps. Kind of liken it to doing a puzzle. Like you kind of get the outline of the puzzle done first, and then you figure out section by section and then piece it together. So I don't know if it's the best analogy, but it's the best I've come up with so far.

Jan Koch 37:58

I think it's an excellent one. And I think it also boils down to what we earlier said is that we can't forget that we are putting humans through these steps. And with every step we take, we need to understand how that step impacts their understanding of what we do and what we offer, and what is in it for them. I think that's what most people get wrong with those email sequences. When you look at books like Russell Branson's funnel secrets or something like that, they have all these amazing templates. And ConvertKit gives you templates and Active Campaign has templates. And they make it look so easy to just click some stuff together, and then you fill in the blank and add your own name and your own business name. And that's it. But you lose the personality at this point. And I'm as guilty of this as anybody. I've used Russell Branson's formula almost word for word in the beginning, because I didn't know better. But you have to think about okay, what is it that I want the subscriber to take away from this specific email? What action should they take? And how do I make sure they open the next email too?

Bev Feldman 39:09

Yeah, and if you're doing things at the beginning, where you're losing trust with people, because either you're sending them too many emails, or you're using a formula and copy therefore that doesn't sound remotely like you, then well, it might make things easier at the beginning. And I am not against templates, like I've used email templates to help me get some thoughts on as I work to find my voice. But, you know, if you aren't doing things that feel right or don't sound right, then I think it's going to come across in your emails.

Jan Koch 39:48

Yeah. And you won't notice it because you are not hearing from people who don't resonate with me. They just unsubscribe and they're gone forever. And you don't know why.

Bev Feldman 39:58

Yeah.

Jan Koch 40:00

Brilliant, we've covered a lot of ground. Do you feel that? There's some topics, some things that I haven't asked that you think we should talk about in terms of automation?

Bev Feldman 40:11

I don't know. I feel like you asked a lot of really great questions. I don't know if you don't mind because I brought it up. And I feel like it provide some context, I can quickly walk through the framework I use.

Jan Koch 40:20

Yes, please do. Yeah, the whole point of it is to break down the steps of setting up the tech, especially for people who are like, I don't know where to begin. So as I mentioned, automate with heart framework. And it's not a formula. But it's just a framework to think about all the elements to think through as you set up your automations. So the first step is the heartfelt thanks. That's each. And it's thinking about what happens immediately after someone on your list takes an action. So using an example of like an opt in page, or an opt in form. What happens immediately after they give you their email address. So I usually recommend some sort of thank you page where it's thanking people for taking the time and sharing this valuable information with you and letting them know what happens next. The next step, the E in heart is email sequences with soul. So you know, remembering that those are humans on the other side. And while I don't do the copy, I think a big piece of it is thinking how the information is presented. So, and then the next step is arranging. So the A is arranging your subscribers, and that's where we're thinking about, how do I use my email marketing platform to really organize my subscribers. So using ConvertKit, because that's what I know best. So they use tags, segments and custom fields as ways to put identifying information to your subscribers. So what do we need to use so that we can better give the right information that our subscribers need, while also doing things like taking them out of our daily newsletter, or weekly newsletter, if they're in an automation. And how we identify them is really key to doing that. And then rolling out the automation is where you've pulled together those pieces. So thinking about the thank you, the opt in process, or if they make a purchase, what happens next, getting that all connected than the emails that you wrote, and then all of the tags and identifying information you need and then pulling that together in an automation. And then finally, as I mentioned earlier, the testing and tweaking, going through signing up for your opt in or if you're selling a product. Giving yourself a zeroed out coupon code. So you can see what the process is like making sure that you're pulled out of an automation that pitches the product or service and pulled into an automation that does a follow up, thanks you, again, gives you really helpful information so that you can make the most out of that. And so my hope is that it's thinking about not only what are the pieces that we need to set up an automation, but how can we do it in such a way that we're keeping for the forefront of our minds, that we're treating people on our email list like people throughout the whole process.

Jan Koch 43:30

It's a fantastic way to wrap up this session. I have nothing to add to that. Friends, if you want to learn more about Bev and what she's doing and see if it's a good fit for you to work together, I have linked her social profiles and the website below this session. You can find all the details right there. Connect with her. She's a lovely human being. Bev, thank you so much for spending time with us today.

Bev Feldman 43:54

Well, thank you so much for having me. This was so much fun.